



Doc Status Inquiries - Requisitions, Purchase Orders & Receipts

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Training Guide
Doc Status Inquiries -Requisitions, Purchase
Orders & Receipts

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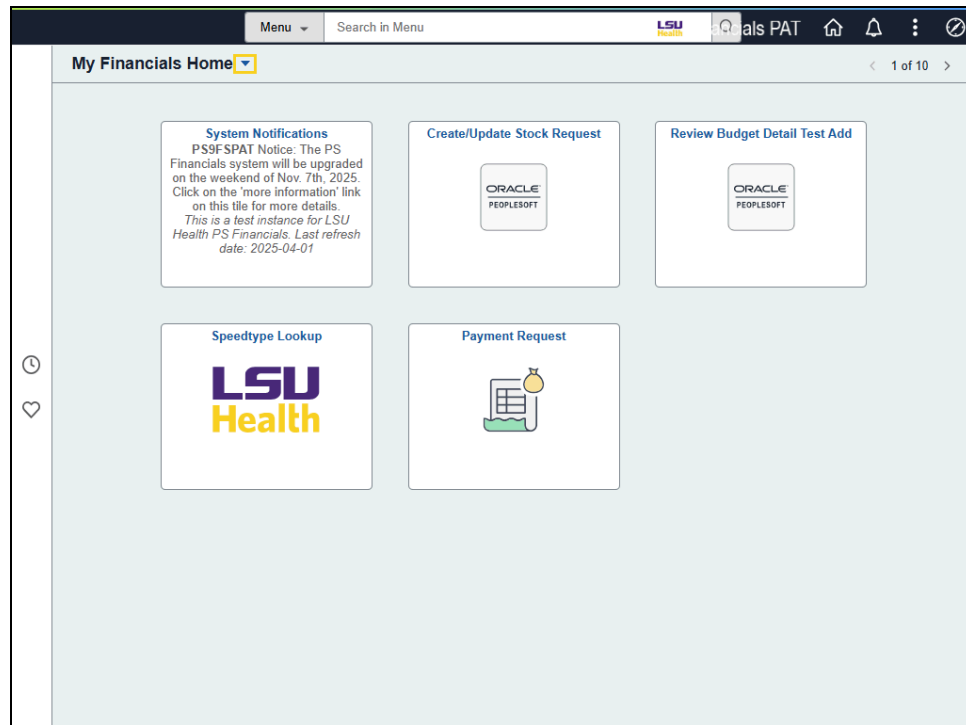
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Doc Status Inquiries – Requisitions, Purchase Orders & Receipts

Document Status Requisition

Procedure

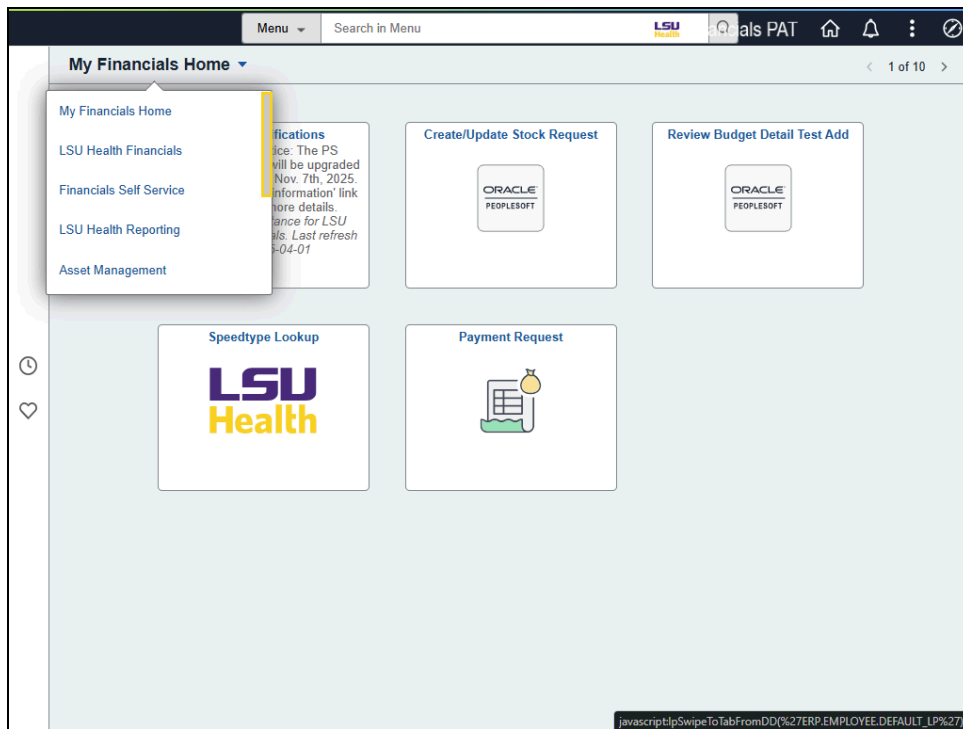
In this topic you will learn how to use **Document Status Requisition**.



Step	Action
1.	From the My Financials Home page, users will <i>navigate</i> to the Procurement <i>homepage</i> and then select the Purchasing Tile. Click the button to the right of the My Financials Home. 

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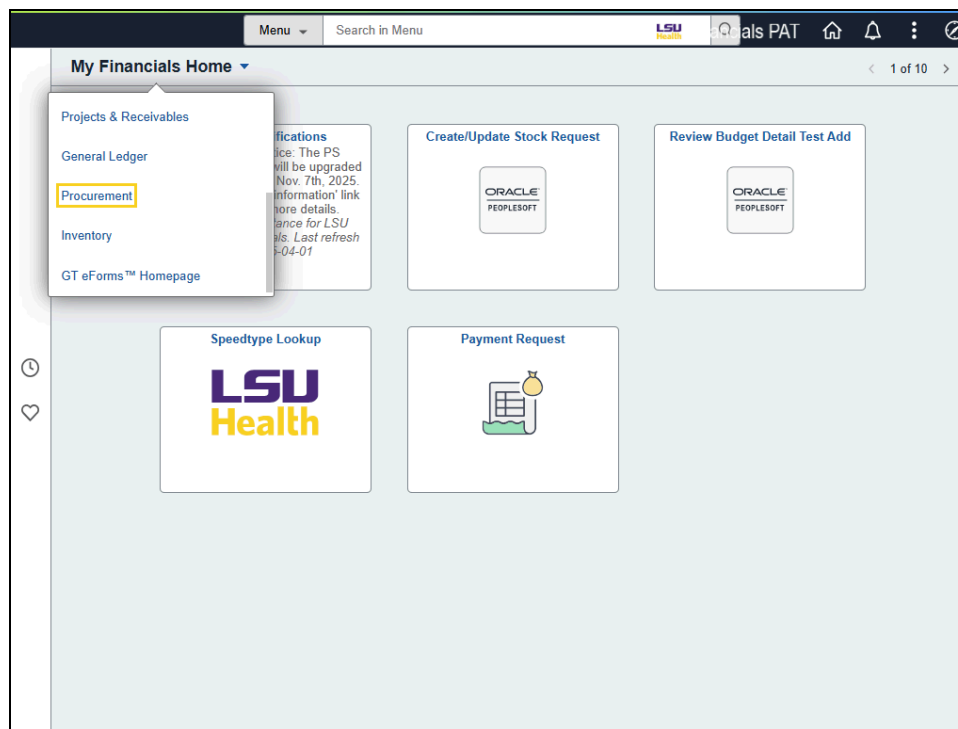
Doc Status Inquiries -Requisitions, Purchase Orders & Receipts



Step	Action
2.	Click the Down button of the scrollbar. <i>NOTE: This step serves as an example for scrolling up and down the menu. Users may also scroll left/right using the scroll buttons at the bottom of the page. No other scrolling steps will be included in this topic.</i> 

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Doc Status Inquiries -Requisitions, Purchase Orders & Receipts



Step	Action
3.	Click the Procurement homepage. 
4.	Click the Purchasing tile.
5.	Click the button to the right of the Requisitions menu option. 
6.	The Document Status page provides a <i>process stream</i> view of a requisition from <i>entry to completion</i>. Documents associated with the various steps within the process stream are <i>available</i> for review such as: Requisition Inquiry page, the PO Inquiry page, the Voucher Inquiry page and the Payment Inquiry page. NOTE: You may only view the Voucher and Payment Inquiry pages if you have the required security access. Click the Document Status Requisition list item. 
7.	Click the Close Navigation Area button. 

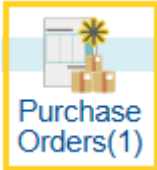
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Doc Status Inquiries -Requisitions, Purchase Orders & Receipts

Step	Action
8.	It is <i>recommended</i> users <i>search</i> by Requisition ID or Requester. <i>Requisition Status</i> can be used in conjunction with <i>Requester</i> to help focus on requisitions retrieved. Enter the desired information into the Requisition ID: field. Enter "0064650".
9.	Click the Search button. 
10.	Document Status Requisition The Document Status page provides a pictorial as well as Doc ID hyperlinks for available <i>process stream documentation</i>. NOTE: <i>You can only access the Voucher and Payment Inquiry pages if you have the proper security.</i>

Training Guide

Doc Status Inquiries -Requisitions, Purchase Orders & Receipts

Step	Action
11.	<i>Pictures that are colored and not greyed out are active links to the designated page. The document type and number of available documents of that type are shown as a blue link below the picture. For example, Vouchers is an active link and shows there are two (2) voucher documents.</i> Click the Req ID 0064650 link. <i>This action will open a new window.</i> 
12.	The Req Inquiry panel displays. Click the Close Requisitions tab. 
13.	Users may select the Purchase Orders (1) picture or the Doc ID link to view PO information. Click the Purchase Orders (1) link. 
14.	The Purchasing Document Status page displays. Select the Doc ID to view the Purchase Order Inquiry page. Click the 00386098 link. <i>This action will open a new window.</i> 
15.	The Purchase Order Inquiry page displays. Click the Close Purchase Order tab. 
16.	Click the Vouchers (2) link. 
17.	The Voucher Documents Status page displays. Select the Doc ID to view the Voucher Inquiry page. Click the 00462844 link. <i>This action will open a new window.</i> 

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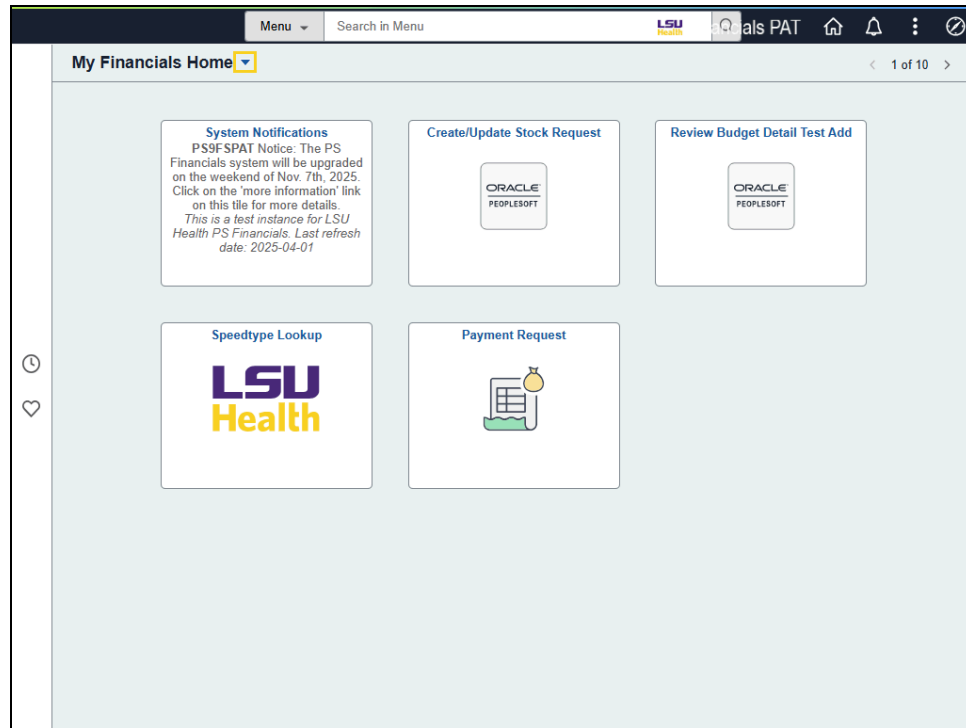
Doc Status Inquiries -Requisitions, Purchase Orders & Receipts

Step	Action
18.	The Voucher Inquiry page displays. Click the Actions dropdown button to activate the menu. 
19.	A list of <i>Action items/documents</i> display. The user <u>must</u> have the <i>appropriate security access</i> to access any of the listed pages. Click the Close Voucher tab. 
20.	Click the Payments (1) link. <i>This action will open a new window.</i> 
21.	The Purchasing Document Status page displays. Select the Payment Reference Doc ID to view the Voucher For a Payment page. Click the 702418 link. <i>This action will open a new window.</i> 
22.	Voucher payment information displays based on Voucher ID in the lower section of the page. Supplier information including <i>supplier address</i> is shown on the <i>upper left</i> section of the page. Payment information is shown on the <i>top right</i> of the page.
23.	Click the Home button. 
24.	This completes <i>Document Status Requisition</i>. End of Procedure.

Document Status Purchase Order

Procedure

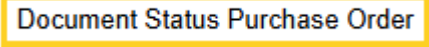
In this topic you will learn how to use **Document Status Purchase Order**.



Step	Action
1.	Click the button to the right of the My Financials Home . 
2.	Click the Procurement menu. 
3.	Click the Purchasing tile.
4.	Click the button to the right of the Purchase Order menu option. 

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Doc Status Inquiries -Requisitions, Purchase Orders & Receipts

Step	Action
5.	The <i>PO Document Status</i> page will allow you to view the <i>status</i> of <i>any documents</i> associated with the <i>PO</i> (i.e. Requisitions, Receipts, Vouchers, and Payments). Click the Document Status Purchase Order list item. 
6.	Click the Close Navigation Area button. 
7.	Users will enter the Business Unit, if not defaulted, and PO Number. In this example, LSUNO will remain the Business Unit and the PO Number = 00397871. Enter the desired information into the PO Number field. Enter "00397871".
8.	Click the Search button. 
9.	Document Status Purchase Order The Document Status page provides a pictorial as well as Doc ID hyperlinks for available <i>process stream</i> documentation. NOTE: You can only access the Voucher and Payment Inquiry pages if you have the proper security.
10.	<i>Pictures that are colored and not greyed out are active links to the designated page. The document type and number of available documents of that type are shown as a blue link below the picture. For example, Requisitions is an active link and shows there is one (1) requisition documents.</i>

Training Guide

Doc Status Inquiries -Requisitions, Purchase Orders & Receipts

Document Status Purchase Order

Business Unit LSUNO PO ID **00397871**
 Document Date 06/14/2024 Status Compl
 Currency USD Document Type Purchase Order
 Buyer Holmes, Deborah Merchandise Amt 116,818.15
 Budget Status Valid

Requisitions(1) Sourcing Events Procurement Contracts Purchase Orders Service Work Orders Receipts Returns Vouchers(1) Payments(1)

Show All

Associated Document

Documents Related Info

Actions	SetID	Business Unit	Document Type	DOC ID	Status	Document Date	Supplier ID	Location
▼ Actions		LSUNO	Requisition	0066576	Complete	06/03/2024		
▼ Actions		LSUNO	Voucher	00473907	Posted	06/25/2024	0000033926	00000000
▼ Actions	SHARE		Payment	707406	Posted	06/28/2024	0000033926	00000000

Step	Action
11.	Click the PO ID 00397871 link to view the <i>PO Inquiry</i> page. <i>This action will open a new window.</i>

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Doc Status Inquiries -Requisitions, Purchase Orders & Receipts

Purchase Order Inquiry

Purchase Order

Business Unit: LSUNO
PO ID: 00397871

Header

PO Date: 06/14/2024
Supplier Name: SCIENTIFIC-013
Supplier ID: 0000033926
Buyer: Holmes, Deborah
PO Reference: REQ. #0066575

Amount Summary

Merchandise: 116,818.15
Freight/Tax/Misc.: 0.00
Total: 116,818.15 USD
Encumbrance Balance: 0.00 USD

Lines

Line	Item ID	Item Description	Category	PO Qty	UOM	Merchandise Amount
------	---------	------------------	----------	--------	-----	--------------------

Step	Action
12.	PO Inquiry page is <i>displayed</i> and the user can <i>view</i> the following <i>PO information</i>: PO Date, Supplier Name and ID Number, PO Status, Budget Status, Encumbrance Balance, Items Ordered, etc.) Click the Purchase Order Close tab. 

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Doc Status Inquiries -Requisitions, Purchase Orders & Receipts

Document Status Purchase Order

Business Unit: LSUNO
 Document Date: 06/14/2024
 Currency: USD
 Buyer: Holmes, Deborah

PO ID: 00397871
 Status: Compl
 Document Type: Purchase Order
 Merchandise Amt: 116,818.15
 Budget Status: Valid

Requisitions(1) Sourcing Events Procurement Contracts Purchase Orders Service Work Orders Receipts Returns **Vouchers(1)** Payments(1)

Show All

Associated Document

Actions	SetID	Business Unit	Document Type	DOC ID	Status	Document Date	Supplier ID	Location
▼ Actions		LSUNO	Requisition	0066576	Complete	06/03/2024		
▼ Actions		LSUNO	Voucher	00473907	Posted	06/25/2024	0000033926	00000000
▼ Actions	SHARE		Payment	707406	Posted	06/28/2024	0000033926	00000000

Step	Action
13.	Click the Voucher button. <i>This action will open a new window.</i> NOTE: You could also select the <i>Voucher</i> link to view the <i>Voucher Inquiry</i> page associated with that number. NOTE: You will only be able to view this page if you have the appropriate security access. 

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Doc Status Inquiries -Requisitions, Purchase Orders & Receipts

Document Status Purchase Order

Business Unit: LSUNO
 Document Date: 06/14/2024
 Currency: USD
 Buyer: Holmes, Deborah

PO ID: 00397871
 Status: Compl
 Document Type: Purchase Order
 Merchandise Amt: 116,818.15
 Budget Status: Valid

Requisitions(1) Sourcing Events Procurement Contracts Purchase Orders Service Work Orders Receipts Returns Vouchers(1) Payments(1)

Show All

Associated Document

Documents Related Info

Actions	Business Unit	Document Type	DOC ID	Status	Document Date	Supplier ID	Location	Go To Do
▼ Actions	LSUNO	Voucher	00473907	Posted	06/25/2024	0000033926	0000000001	

Return to Search

Step	Action
14.	Click the Show All Columns button. 
15.	You can view <u>all</u> associated information regarding the voucher. <i>NOTE: If you have the appropriate access, you can click the Accounting Entries link to view chartfield and journal information.</i>
16.	Click the Voucher ID - 0047397 link. This action will open a new window. 
17.	Use the Voucher Inquiry page to view: the Invoice Number, Invoice Date, Supplier ID, Invoice Amount, Post Status, Invoice Date, and Acctg Date. Click the Close button to return to the Document Status page. 

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Doc Status Inquiries -Requisitions, Purchase Orders & Receipts

Document Status Purchase Order

Business Unit: LSUNO
 Document Date: 06/14/2024
 Currency: USD
 Buyer: Holmes, Deborah

PO ID: 00397871
 Status: Compl
 Document Type: Purchase Order
 Merchandise Amt: 116,818.15
 Budget Status: Valid

Requisitions(1) Sourcing Events Procurement Contracts Purchase Orders Service Work Orders Receipts Returns Vouchers(1) **Payments(1)**

Show All

Associated Document

Actions	Business Unit	Document Type	DOC ID	Status	Document Date	Supplier ID	Location	Go To Document Status Inquiry	Ma Wc
▼ Actions	LSUNO	Voucher	00473907	Posted	06/25/2024	0000033926	0000000001		Ma Wc

Return to Search

Step	Action
18.	Click the Payments button. <i>NOTE: You will only be able to view this page if you have the appropriate security access.</i> 

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Doc Status Inquiries -Requisitions, Purchase Orders & Receipts

Procurement
Purchasing
Financials PAT
New Window | Help | Personalize Page

Document Status Purchase Order

Business UnitLSUNO
Document Date06/14/2024
CurrencyUSD
BuyerHolmes, Deborah

PO ID00397871
StatusCompl
Document TypePurchase Order
Merchandise Amt116,818.15
Budget StatusValid

Requisitions(1)
Sourcing Events
Procurement Contracts
Purchase Orders
Service Work Orders
Receipts
Returns
Vouchers(1)
Payments(1)

Show All

Associated Document

Documents
Related Info

Actions	SetID	Document Type	DOC ID	Status	Document Date	Supplier ID	Location	Go To Doc In
Actions	SHARE	Payment	707406	Posted	06/28/2024	0000033926	0000000001	

Return to Search

Step	Action
19.	Click the Payment Doc ID - 707406 link. <i>This action will open a new window.</i> 707406
20.	Use the Payment Inquiry page to view: Payment Reference ID (Check Number), Payment Method, Amount, Payment Date, Payment Status, Reconciliation Status, and Supplier Address (where check is mailed). NOTE: In this example, the Payment Amount is the Voucher Invoice Amount. In some instances, the Payment Amount will be made up of more than one Voucher Invoice Amount. Click the Close button to return to the Document Status page. 

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Doc Status Inquiries -Requisitions, Purchase Orders & Receipts

Document Status Purchase Order

Business Unit LSUNO
 Document Date 06/14/2024
 Currency USD
 Buyer Holmes, Deborah

PO ID [00397871](#)
 Status Compl
 Document Type Purchase Order
 Merchandise Amt 116,818.15
 Budget Status Valid

Requisitions(1) Sourcing Events Procurement Contracts Purchase Orders Service Work Orders Receipts Returns Vouchers(1) Payments(1)

Show All

Associated Document

Documents Related Info

Actions	SetID	Document Type	DOC ID	Status	Document Date	Supplier ID	Location	Go To Doc In
▼ Actions	SHARE	Payment	707406	Posted	06/28/2024	0000033926	0000000001	

Return to Search

Step	Action
21.	Click the Return to Search button. 
22.	Click the 00397871 link. 
23.	Click the Show all columns button. 
24.	Click the Voucher Accounting Entries link. <i>This action will open a new window.</i> <i>NOTE: You will only be able to view this page if you have the appropriate security access.</i> 

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Doc Status Inquiries -Requisitions, Purchase Orders & Receipts

Voucher Accounting Entries

*Business Unit: LSUNO Voucher ID: 00473907 Invoice Number: 9526/UK
 *Accounting Line View Option: View Both Invoice Date: 06/25/2024
 Supplier ID: 0000033926 *Sort By: Posting
 Supplier Name: SCIENTIFICA

Accounting Information

Posting Process: AP Accrual GL Dist Status: Distributed Posting Date: 06/25/2024

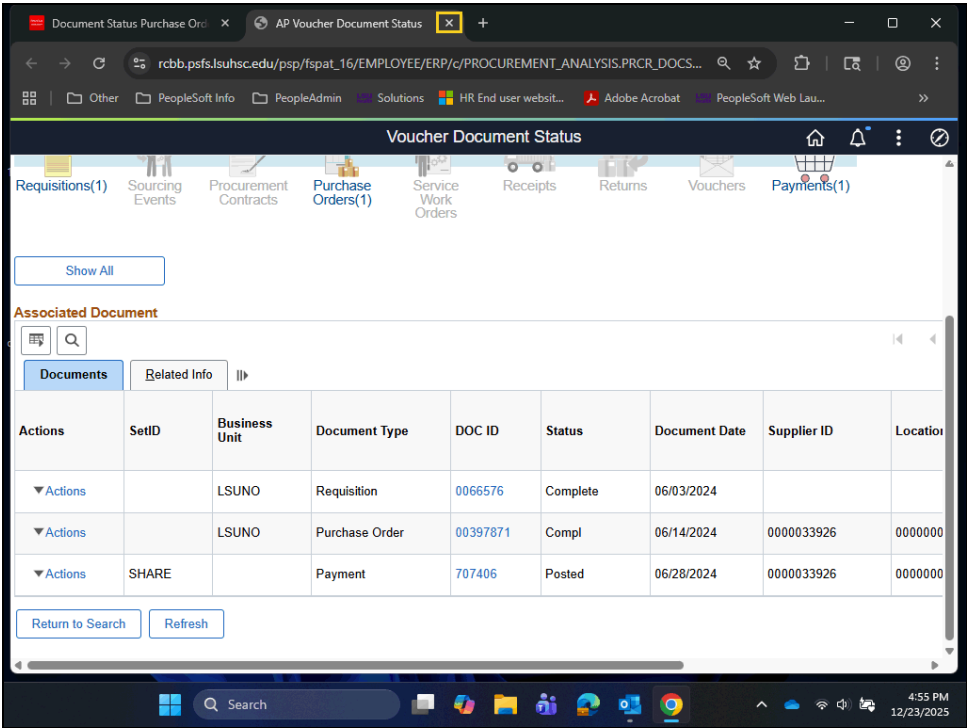
Main Information | Chartfields | Journal | 

Description	Monetary Amount	Currency Code	Ledger	GL Unit
10 Port USB Hub	117.73	USD	ACTUALS	LSUNO
10 Port USB Hub	116.19	USD	ACTUALS	LSUNO
10 Port USB Hub	62.86	USD	ACTUALS	LSUNO
120S/DM2 Peristaltic Pump	1,747.31	USD	ACTUALS	LSUNO
120S/DM2 Peristaltic Pump	1,724.27	USD	ACTUALS	LSUNO
120S/DM2 Peristaltic Pump	932.80	USD	ACTUALS	LSUNO
ANY Water immersion chiller	858.77	USD	ACTUALS	LSUNO

Step	Action
25.	Click the Show all columns button. 
26.	There are 168-line items associated with this voucher. View the following for each line item: Monetary Amount, Currency Code, GL Unit, and Accounting Date.
27.	In this portion of the page, view the following for each line item: Account, Fund, Department, Program Code, and Class Field.
28.	View the PC Business Unit and the Project number .
29.	View the following voucher information: Journal ID, Line, Journal Date, Budget Date, Budget Status, and Primary.
30.	Click the Close AP Accounting Entries button. 
31.	Click the Voucher Go To Document Status Inquiry button. <i>This action will open a new window.</i> NOTE: You will only be able to view this page if you have the appropriate security access. 

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Doc Status Inquiries -Requisitions, Purchase Orders & Receipts



Step	Action
32.	View the Voucher Document Status page. From this page you can <i>navigate</i> to any <i>Document Type Inquiry</i> page. Click the Close AP Voucher Document Status tab. 

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Doc Status Inquiries -Requisitions, Purchase Orders & Receipts

Voucher Document Status

Voucher ID

00473907

Document Tolerance Status

Valid

USD

Invoice Date

06/25/2024

Approval Status

Approved

SCIENTIFIC-013

Document Type

Voucher

Status

Posted

Budget Misc Status

Valid

Budget Status

Valid

Match Status

Matched

Purchase Orders(1)

Service Work Orders

Receipts

Returns

Vouchers

Payments(1)

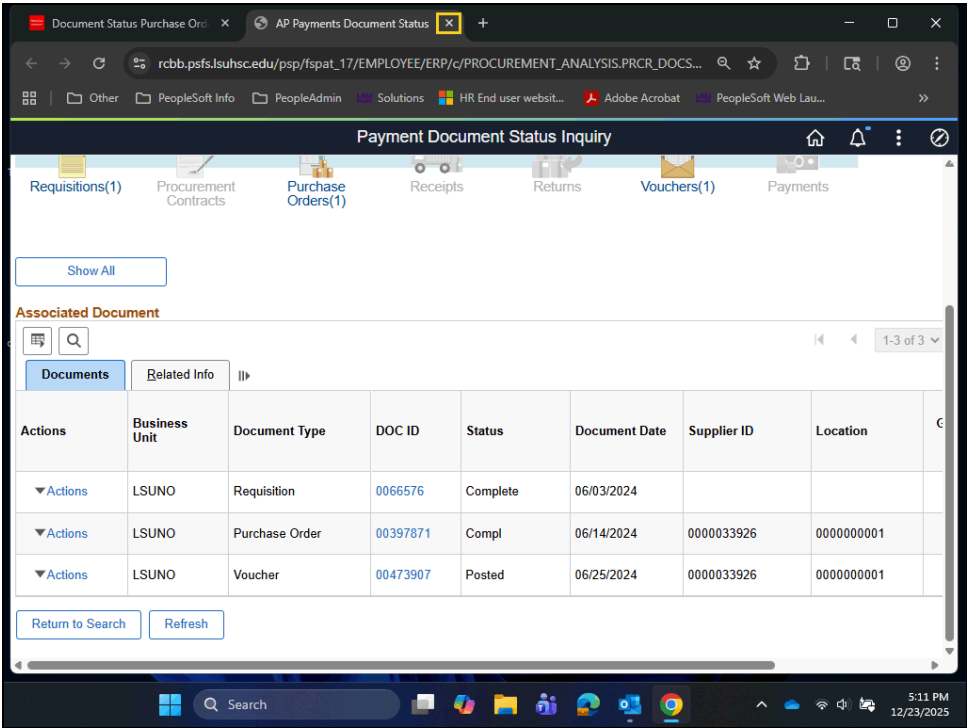
1-3 of 3

View All

Document Type	DOC ID	Status	Document Date	Supplier ID	Location	Go To Document Status Inquiry
Requisition	0066576	Complete	06/03/2024			
Purchase Order	00397871	Compl	06/14/2024	0000033926	0000000001	
Payment	707406	Posted	06/28/2024	0000033926	0000000001	

Step	Action
33.	Click the Payment Go To Document Status Inquiry button. <i>This action will open a new window.</i> NOTE: <i>You will only be able to view this page if you have the appropriate security access.</i> 

Training Guide Doc Status Inquiries -Requisitions, Purchase Orders & Receipts



Step	Action
34.	View the Payment Document Status page. From this page you can <i>navigate to any Document Type Inquiry</i> page. Click the Close AP Payments Document Status tab. 

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Doc Status Inquiries -Requisitions, Purchase Orders & Receipts

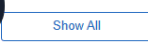
Procurement Purchasing Financials PAT     

New Window | Help | Personalize Page

Document Status Purchase Order

Business Unit LSUNO PO ID 00397871
 Document Date 06/14/2024 Status Compl
 Currency USD Document Type Purchase Order
 Buyer Holmes, Deborah Merchandise Amt 116,818.15
 Budget Status Valid

Requisitions(1) Sourcing Events Procurement Contracts Purchase Orders Service Work Orders Receipts Returns Vouchers(1) Payments(1)



Associated Document

Documents Related Info 

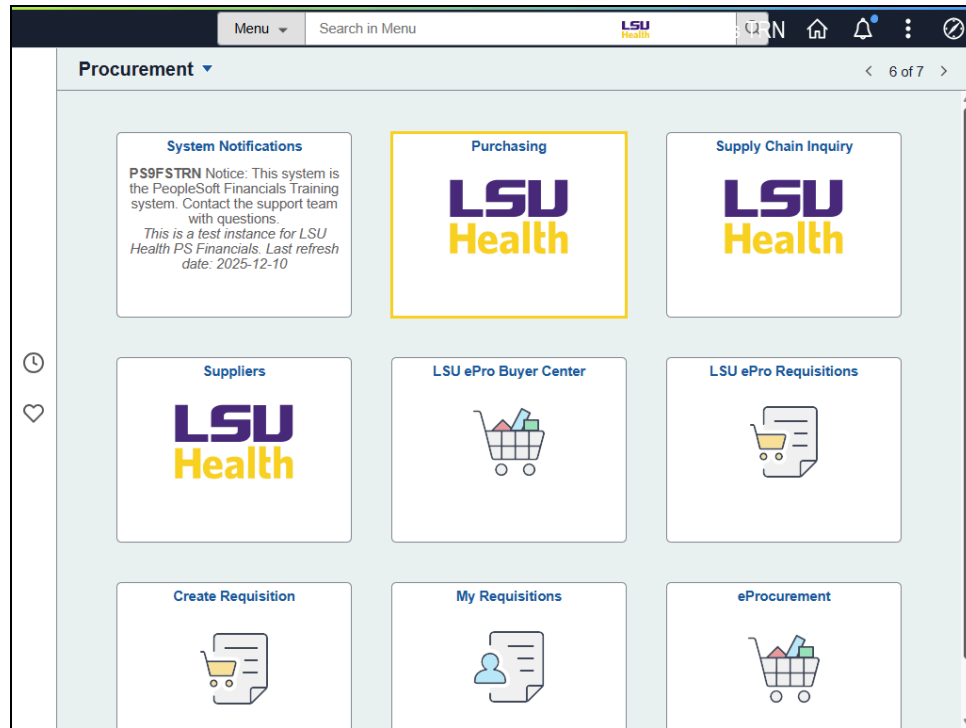
Actions	SetID	Business Unit	Document Type	DOC ID	Status	Document Date	Supplier ID	Location
▼ Actions		LSUNO	Requisition	0066576	Complete	06/03/2024		
▼ Actions		LSUNO	Voucher	00473907	Posted	06/25/2024	0000033926	00000000
▼ Actions	SHARE		Payment	707406	Posted	06/28/2024	0000033926	00000000

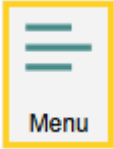
Step	Action
35.	Click the Home button. 
36.	This completes <i>Document Status Purchase Order</i> . End of Procedure.

Document Status Receipts

Procedure

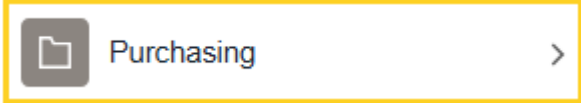
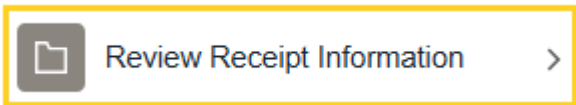
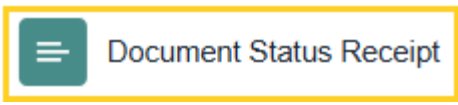
In this topic you will learn how to use **Document Status Receipts**.



Step	Action
1.	Click the Purchasing tile.
2.	Receipts do <u>not</u> appear in the Procurement menu. The user <u>must</u> <i>navigate</i> using the NavBar instead.
3.	Click the Menu button. 
4.	Click the Menu button. 

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Doc Status Inquiries -Requisitions, Purchase Orders & Receipts

Step	Action
5.	Click the Down button of the scrollbar. <i>NOTE: This step serves as an example for scrolling up and down the menu. Users may also scroll left/right using the scroll buttons at the bottom of the page. No other scrolling steps will be included in this topic.</i>
6.	Click the Purchasing menu. 
7.	Click the Receipts menu. 
8.	Click the Review Receipt Information menu. 
9.	Click the Document Status Receipts list item. 
10.	Business Unit Your Business Unit should <i>default</i> into the Business Unit field when <i>working in Production</i> . If it does <u>not</u> default, <i>enter it or select it</i> by clicking the Lookup Business Unit button to the right of the Business Unit field. Then <i>contact your Purchasing Superuser</i> to ensure that the <i>Business Unit defaults</i> into this field for <i>future receipts</i> . <i>Click green book icon below for a list of Business Units.</i>



NOTE: The following is a list of the Business Units that should be entered into the Business Unit field, depending on the facility at which the end-user is employed.

LAKMC: Lallie A. Kemp Medical Center
LSUNO: Louisiana State University New Orleans
LSUSH: Louisiana State University Shreveport

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Doc Status Inquiries -Requisitions, Purchase Orders & Receipts

Step	Action
11.	You may enter or select one of the following search criteria to retrieve the Receipt: • Receipt (ID) Number - The Receipt Number is generated after entering and saving the receipt. When working in Production, this is the number that you will record after entering a Receipt. <i>See "Entering a Receipt for an Inventory Item" and "Entering a Receipt for a Non-Inventory Item" topics for details on obtaining a Receipt Number.</i> • Bill of Lading: The number entered in the Bill of Lading field when you entered the Receipt; or • User ID
12.	Caution: Searching only by Received Date, Ship To Location, or Supplier ID could result in a large list of receipts that takes a long time to run.
13.	Enter the desired information into the Receipt Number field. Enter " 056367 ".
14.	Click the Search button. 
15.	View the Document Status Receipt page. This page displays information such as <i>Status, Supplier Short Name, Merchandise Amt and any associated documents.</i> NOTE: From the Document Status page you may view: • <i>The Inquiry page of this document (in this example you may view the Receiver Inquiry page) or</i> • <i>The Inquiry pages of the Requisition Lines, PO, Vouchers and/or Payments associated with the Receipt.</i> NOTE: You may only view the Vouchers and Payments if you have access to these pages.
16.	Document Status Receipt The Document Status page provides a pictorial as well as Doc ID hyperlinks for available process stream documentation. NOTE: You can only access the Voucher and Payment Inquiry pages if you have the proper security.
17.	Click the Receipt Number 056367 link. <i>This action will open a new window.</i> 

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Doc Status Inquiries -Requisitions, Purchase Orders & Receipts

View Receipt Information New Window | Help | Personalize Page

Receipts

Unit LAKMC Receipt No 056367 Source On-line Receipt Status

Receipt Lines

Receipt Lines More Line Data Optional Input ||>

Sel	Line	Item	Description	Price	Amt Only	Recv Qty	Recv UOM
☐	1		Foam Wedge Ref# 929204 (Positi	73.09000	☐	1.0000	CAS
☐	2	127099	BIOPSY PUNCH 3MM Integra Life	90.22000	☐	1.0000	BX
☐	3	127100	BIOPSY PUNCH 4MM Integra Life	90.22000	☐	1.0000	BX
☐	4	191011	SINGLE PATIENT USE BLOOD PRESS	33.91000	☐	3.0000	CS

[Header Details](#) Line Details Manufacturer Info
[Document Status](#) Header Comments Display RTV Information
[Distribution](#) Putaway Information Device Tracking

[Return to Search](#) [Previous in List](#) [Next in List](#) [Notify](#)

Step	Action
18.	The Receipts page is displayed. The user is <i>defaulted</i> onto the <i>Receipt Line</i> tab. On this tab, the user can view the various item <i>Descriptions</i>, the <i>Recv Qty</i>, and the <i>Recv UOM</i>. Click the Header Details link. <i>This action will open a new window.</i> Header Details
19.	The Header Details page displays <i>Supplier information</i>, <i>Receiving information</i>, <i>Ship To location</i>, the <i>Bill of Lading number</i>, and <i>Packing Slip number</i>. Click the Close Header Details button.
20.	The user is <i>returned</i> to the Receipts page. Click the More Line Data tab. More Line Data

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Doc Status Inquiries -Requisitions, Purchase Orders & Receipts

Step	Action
21.	The <i>More Line Data</i> tab displays the <i>Accept Qty</i>, <i>Net Recv</i>, <i>Supplier UOM</i>, <i>Status</i> (<i>R=Received</i>), the <i>Ship To</i> designation, the <i>Due Date</i>, and <i>Supplier Item ID</i>. Click the Display RTV Information link. <i>This action will open a new window.</i> Display RTV Information
22.	If <i>any item(s)</i> is <i>returned</i> to the supplier, that information will be <i>displayed</i> on the Return To Vendor/Supplier (RTV) panel. Click the Close Return To Vendor/Supplier button. 
23.	Click the Optional Input tab. Optional Input
24.	The <i>User ID</i> of the person who <i>entered</i> the <i>receipt</i> is <i>displayed</i> on the <i>Optional Input</i> tab. Click the Document Status link. Document Status
25.	Click the Related Info tab. Related Info
26.	When working in Production, you may have several Accounting Entries from which to choose. The pages that may be accessed by selecting available Accounting Entries include: • Requisition Accounting Entries page, • PO Acctg Ln Lookup (PO Accounting Line Lookup) page, • Voucher Accounting Entries page, or • Payment Accounting Entries page. NOTE: <i>You may only view the Accounting Entries pages if you have the security access needed to view these pages.</i>
27.	Users can <i>select</i> the <i>Show all columns</i> button. This will <i>remove</i> the <i>tabs</i>, and the user can <i>view all columns</i> on a single page by <i>scrolling right</i>.
28.	This completes Document Status Receipts. End of Procedure.